Enterprise - How to Set up Benefit Adjustments for Employees and Employers

Last Modified on 12/30/2019 10:05 am CST

Employee benefits often include a variety of programs that employers can choose to offer employees, for example:

- Health Care Insurance (including coverage in accordance with ACA)

- Disability Insurance

- Life Insurance

- 401K/Retirement Plans

In order for benefits to be tracked accurately in Enterprise, two adjustments need to be created in administration - one to document the employer benefit contribution and another to document the employee contribution. In addition, both adjustments must be attached to the employee's record. This article will walk through both pieces.

Part One: Creating Benefit Adjustments in Administration

Step 1: Navigate to the administration section of Enterprise and from the *adjustments* page, select the **+** icon to add a new adjustment.

> ***Note*** Only certain users have access to the administration module within Enterprise. If you are not seeing administration from the "all options" list, please see your manager for assistance.

In this example, we'll be adding the employer portion first. Within the core adjustment setup, be sure to select a category that is listed as a *benefit* and that reflects the correct adjustment type, i.e. if the benefit is pre tax (adjust gross) or post tax (adjust net).

Category	Adj Id	Description	Billable	Adjusts Net	Adjusts Gross	Benefit
Benefit		Benefit	False	False	True	True
BillableEx		Billable expenses incurred by employee	True	True	False	False
BillOnly		BillOnly	True	False	False	False
Caf125		Caferia 125 plan	False	False	True	False
CalcGrAdNt		Calculate based on gross but adjust from net pay	False	False	True	False
DepCare		Pre Tax Dependent Care	False	False	True	False
FSA		Pre Tax FSA	False	False	True	False
Garnish		Garnishment	False	True	False	False
GrsBenefit		Benefit	False	False	True	True
GrsCalc		Adj calculation on gross pay	False	True	False	True
GrsCalNetD		Percent calcs on Grs but deducts from net	False	False	True	False
GrsRtmt		Retirement against Gross	False	False	True	False

Step 2: Once you have successfully added the first adjustment, select the **+** icon to create the second adjustment in administration (remember, we need an employer and employee adjustment).

Following our example, we will now add the employee portion and name the adjustment to reflect this. Within the core adjustment setup, be sure to select a category that accurately reflects whether the employee's portion of the contribution is pre tax (adjust gross) or post tax (adjust net). The employee portion should NOT be listed as a benefit.
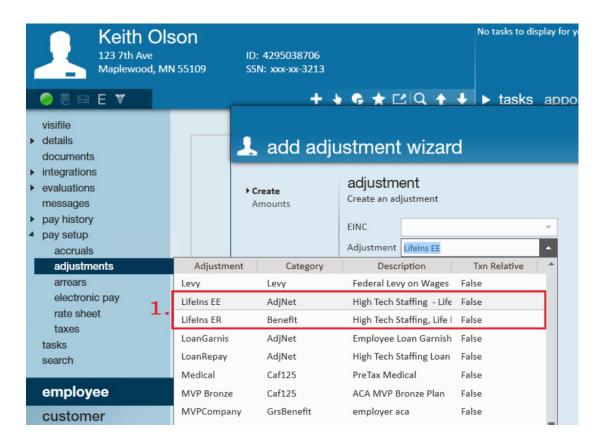

Category	Adj Id	Description	Billable	Adjusts Net	Adjusts Gross	Benefit
100pct401k		100pct401k	False	False	True	False
Add Gross		Added Gross Wages	True	False	True	False
AdjNet		An adjustment to net.	False	True	False	False
Advance		Advance	False	True	False	False
Bank		Bank	False	True	False	False
Banked		Permanent adjustment tracing	False	True	False	False
Benefit		Benefit	False	False	True	True
BillableEx		Billable expenses incurred by employee	True	True	False	False
BillOnly		BillOnly	True	False	False	False
Caf125		Caferia 125 plan	False	False	True	False
CalcGrAdNt		Calculate based on gross but adjust from net pay	False	False	True	False
DepCare		Pre Tax Dependent Care	False	False	True	False

With the adjustments now created in administration, we are ready to attach them to an employee record.

Part Two: Attaching the Benefit Adjustments to an

Employee Record

Step 1: Within the adjustments page of the employee record, select the + icon to open the *add adjustment wizard.* Following our example from above, we will need to attach two adjustments - the employee portion for life insurance and the employer benefit contribution.

Before moving on, both adjustments should be added and reflected in the employee's adjustment table:

> ***Note*** The employer benefit contribution should be entered as a *positive* number. In the example below, we have entered *LifeIns ER* as a $13.30 benefit per pay period for our employee. Enterprise will know to treat this as a benefit so long as the adjustment has been tied to the benefit category (reminder that this is done within administration).

EINC	Adjustment	Description	Active	Sequence	YTD Total	Lifetime Total	MTD Total	WTD Total
	LifeIns ER		☒		$0.00	$0.00	$0.00	$0.00
	LifeIns EE		☒		$0.00	$0.00	$0.00	$0.00

2.

adjustment amounts   ✚ ✎ ✖

○ Deduct Greater ◉ Deduct Lesser

Amount
$13.3

Main	Pay/Misc

Adjustment	LifeIns ER	Note	
Description		Sequence	
Active	☒	Date Served	5/23/2017

Reviewing Check Details:

When reviewing a check for our example employee, we see both the (1.) employee contribution and employer benefit listed in the check stub:

⑈000078596⑈ ⑆678992345⑆ 333322221111⑈

⑈0000007859563⑈ ⑆543089763⑆ 333322221111⑈

Name: Olson, Keith			Social Security Number:		XXX-XX-3213			Check Date:			6/2/2017			
Company	**Week End**	**Pay**	**Earnings**	**Rate**	**Hrs**	**OT Rate**	**OT Hrs**	**DT Rate**	**DT Hrs**	**Units**	**Units Rate**	**Salary**	**Gross Wages**	
Murphy Construction	5/28/2017	Weekly	Reg	$12.00	80.00	$18.00	0.00	$24.00	0.00	0.00	$0.00	$0.00	$960.00	

		Allowances:	Federal-Single	0
			Alaska - No State	0
			Minnesota Single	0

Gross	$960.00
Net	$673.00
Year To Date Gross	$1,920.00

Check Number: 785963

1.

Tax		Tax	YTD Tax	AWH
AKEEUN		$4.80	$9.60	$0.00
MNIncTax		$56.26	$102.89	$0.00
FedIncTax		$147.00	$259.80	$0.00

Adj	Benefit Amt	Amt	YTD
LifeIns ER: High Tech Staffing, Life	$13.30		$26.60
LifeIns EE: High Tech Staffing - Life		$5.50	$11.00

Related Articles